



**State Controller's Office**  
**Personnel/Payroll Services Division**  
**Transaction Supervisors Forum**  
**February 21, 2019**

**Program Management and Analysis Bureau (PMAB)**

❖ **Employment History – Pliny Reynolds**

- Other Post-employment Benefits (OPEB):
  - The mass update for the OPEB CBID ran successfully on 01/31/19. We are in the process of updating PAM and PPM revisions with OPEB CBID related items. In addition, we are working on updating the OPEB FAQs to include specific examples and scenarios.
- Forum Questions:
  - Will departments received a Turnaround PAR from the OPEB CBID mass update?
    - Due to the volume of records, the SCO will not produce Turnaround PARS.
  - An employee's record was not updated while on SDI (S50 transaction), will SCO update the employee's record?
    - PPSD will manually update EH records not included in the mass update and will notify departments of any situations requiring department actions. (Please note, records with appointment or separation expiration dates earlier than 01/31/19, will not be updated)
  - Can departments key the 126 transaction?
    - Yes, departments can key a 126 transaction.

❖ **California Leave Accounting System (CLAS) – Judi Burzese/Sarah Lever**

- Sarah Lever of the CLAS Unit is locating dual accruals for Annual Leave and Sick Leave, and will be contacting departments regarding these errors. The most common error we are finding is when retroactively keying a transfer from Vacation to Annual Leave. Please ensure that specialists are voiding the Sick Leave accruals that were posted, that are now for the same month or past the effective date of the Annual Leave.
- Reminder: The Annual Leave and Sick Leave report is on ViewDirect, and may be utilized for locating dual accruals for 2014 and 2015.

❖ **Affordable Care Act (ACA) – Corey Cummings**

- We have experienced multiple issues with the compliance reports released on February 1<sup>st</sup>, 2019. Departments should now have access to view all of the compliance reports. We are aware that there are still data issues with some of the reports. We are continuing to look into them and will provide an update as soon as we are able. If departments experience trouble viewing a report please call ACA Support and we will get it fixed (916) 322-3770.
- 1095-C's are currently being issued and will arrive by mail to employees within the next week or so. As with previous years, no duplicate 1095-Cs should be requested until ViewDirect report PDA1782 is published. That should also happen within the next week or so.

- The ACA team has provided 278,152 1095-C records to the SCO Disbursements unit to print and mail out to employees. This is almost 4,000 more than last year. Thank you to all of the departments for consistently keying throughout the year and helping to get all last-minute data keyed before the end of the year.
- Forum Question:
  - If the mailing address of an employee has changed, where will the employee's 1095-C get returned to?
    - The 1095-C will get returned to SCO who will in turn send the 1095-C to the department of the employee. It will be the department's responsibility to forward the 1095-C on to the employee's new address.

## Personnel and Payroll Services Bureau

### ❖ **W-2, Non-USPS, Miscellaneous Deductions – John Ochoa**

- All W-2's were mailed out.
- Undeliverable W-2's are automatically returned to the employee's agency/campus. Please remember to update incorrect address records when distributing undeliverable W-2's to your employees.
- For employees who did not receive their 2018 W-2, SCO will waive the fee for providing a duplicate W-2 if the request is received by March 01, 2019.
- If you have duplicate W-2 questions please contact (916) 445-2847. If you have W-2 reporting information or W2C information please contact the Statewide Customer Contact Center at (916) 372-7200.

### ❖ **Civil Service (CS) Payroll - Renee McClain**

- CS Payroll continues to process Lump Sum Deferrals for 2018 separations. To date we have processed over 2,100 separations.
- Standard Form 674:
  - Please be sure to include dates and hours of dock on 674s and 674 ARs. SCO staff are having to make phone calls to get this information to process documents. The dock time and time worked must equal what the employee is due for the pay period.
  - If you have an employee who is in the process of separating and you need to submit a 674 AR, please fax it to payroll to Joan Lleren's attention.
- Please only fax documents when you have been instructed to do so. Documents that are faxed without approval will be placed in that day's workload.
- If you have been instructed to fax a document to SCO please fax it to the appropriate area and person to ensure your document is received and processed timely. Staff continue to receive faxes for other areas and are routing them to the appropriate area. Click [here](#) to view our fax numbers.

### ❖ **Civil Service (CS) Benefits – Rebecca Doctolero**

- PI Dental and Vision are being processed this month.
- DEV/DRV deletions auto dropped on February 01, 2019 with an effective date of March 1, 2019. CS Benefits staff have keyed as many as possible before Master Payroll cutoff.
- Backlogs are growing in Flex and Health. Staff will begin blitzing this week.

### ❖ **Civil Service (CS) Disability - Nastassja Johnson**

- Standard Form 674D:
  - Reminder: Please use the current version of Standard Form 674D. You can find the current version of the form on the [Department of General](#)

[Services' California State Forms Directory](#). The outdated form will be returned to you.

- Welcome Karin Johnson-Anderson, our new CS Disability Program Manager.
- ❖ **Statewide Customer Contact Center (SCCC) - Nastassja Johnson**
  - Meeting notes are now available on our [website](#).
  - The State Controller's Office (SCO) is committed to providing the highest level of customer service possible. With that, we would like to share the reminder that we are here to service Department's and/or Campus Human Resources (HR) Offices. Employees are best served by their own Department and/or Campus HR Office, as they have a direct relationship with the employee and can best address the employee's needs. We ask that Department and/or Campus HR Offices do not share SCO's direct contact information with employees. If an employee requires HR-related assistance, please direct the employee back to his/her respective HR Representative. This will ensure that SCO can continue providing excellent customer service to Departments and/or Campus HR Offices.
  - Escalation Email:
    - Reminder: Our Escalation email ([PPSDOps@sco.ca.gov](mailto:PPSDOps@sco.ca.gov)) is for Supervisors and Managers. You can find guidelines to using our Escalation email on our website under Human Resources.
  - California Personnel Office Directory (CPOD):
    - Please update [CPOD](#) with current information.
  - Forum Question:
    - PIMS automatically logs users out and when the user logs back in it brings them back to the home screen.
      - Please troubleshoot this issue with your agency's information technology department.

## California State Payroll System (CSPS)

- Future State Workflow Sessions:
  - As of 02/20/19, the project has conducted to-be workflow sessions for the Personnel Administration capability. This includes Adding New Employee or Manage Employee Status process flows.
  - Registration is open for Time & Attendance, Benefits Administration, and Payroll. Visit our website for registration and more information.  
<https://www.sco.ca.gov/csps.html>
- Market Research:
  - The CSPS team has conducted meetings with other state and federal organizations to discuss lessons learned from their payroll projects
  - CSPS held a vendor event to introduce our project to the vendor community, and also discuss various option for a future state solution.